

# Five Steps to Better Practice Management

by Sandy and Alan Richardson



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Great practice management results are a consequence of following a recipe. These five simple yet powerful steps are fundamental to long-term success. This article is written to provoke your curiosity regarding your practice.

The five major steps in our successful practice management recipe are:

*Step 1: Create a great emotional experience for the patient.*

*Step 2: Ensure that the examination process is the main event of the day for both new and established patients.*

*Step 3: Segue the examination process from enrollment to treatment.*

*Step 4: Develop a powerhouse hygiene department.*

*Step 5: Fully engage your team to own the vision, team agreements, and your philosophy of patient care.*

## **Create a great emotional experience for the patient**

From the patient's perspective, most dentistry is perceived to be an unpleasant physical experience. The average patient is incapable of determining the clinical quality of the care being delivered. So, what sets you apart from the pack?

What sets you apart is the image, branding, reputation, and culture of the practice that preframes your patients into the expectation that they will have a good emotional experience. You are creating certainty for the patient - certainty that they will be treated as special and unique, that it is safe in your practice, and that the focus of the doctor and team is always on the patients and not on themselves, their egos, or their self-importance.

The quality of the marketing pieces, Web site, logo, and the way the phone is answered on that first contact are all critical to conveying the overwhelming impression that in your office, it's all about the patient. Create an environment

of hospitality so patients know their needs can be met and that they are special. From the very first visit, patients should be made to feel unique and important. They are honored guests. Your patients are the customers who are paying everyone's salary, putting a roof over your head, and food on the table. Happy customers refer more customers - it is that simple!

Do your physical appearance and the way you and your team dress convey professionalism, cleanliness, and health? Are your teeth straight, white, and even to represent your "product"? Are your team members proud of their teeth? Are they role models of possibility? Does your business office team dress professionally with matching jackets, shells, and pants? Does your clinical team wear long lab coats with the practice name and logo? Do they look sharp, bright, energetic, and enthusiastic? Are they team players?

All these "images" create an emotional experience for the patient. They condition the patient to accept treatment because you have removed all distractions which can create uncertainty.

Upon completion of treatment, do you congratulate the patient on a good decision and an excellent outcome, and is this message continued throughout the check-out process? Does the patient leave your office saying, "That was a great experience. These people make me feel really good!"

## **Ensure that the examination process is the main event of the day for all patients**

In many dental offices, there is confusion over the importance of exams. Having to "go do an exam" is frequently regarded as an interruption, an inconvenience, and a nuisance that gets in the way of doing your work. Hygienists sometimes view exams with dread because the doctor is late, which creates anxiety, frustration, and sometimes embarrassment.

Let's reframe the exam and say "the most important procedure performed is an exam." An exam is the opportunity to "make a sale." As a business, you live or die by sales. Call it diagnosis, enrollment, or treatment-planning - when it is done well and the patient accepts treatment - it is a sale! Sales provide income, and income pays bills and creates prosperity. At the same time, you are improving the health of your patients. Sales are a "win-win" for both the patient and your practice.

For operative dentistry, sales come from only three sources:

- New patient exams
- Recare exams
- Emergency exams

New patient exams: Are your patients fully aware of your new-patient process? This must be made clear from the first phone contact to when patients visit the office. What will

happen, how long will it take, and who will patients see? Do they feel they have been heard and that their needs will be met?

Is there a new patient interview process to determine patients' needs, wants, and values? This interview should be completed prior to any evaluation in the clinical area.

Again, this conveys to patients that they have been fully heard and their needs identified. Is there a system in place to convey this critical information to the clinical team?

Upon completion of the exam, has the doctor clearly identified the priorities for treatment and received confirmation that the patient is ready to schedule?

Recare exams: This must be a staged event where the doctor and hygienist have a preset protocol for the process. The hygienist calls for the exam after the health history is confirmed, X-rays are available, intraoral pictures have been taken, and perio charting is complete. This gives the doctor 30 minutes of lead time. When the doctor arrives, short pleasantries are exchanged with the patient and the doctor invites the hygienist to review progress, with the emphasis on co-diagnosis and involving the patient in the process. The doctor completes the exam and a discussion occurs about recommended treatment.

This "event" should be conducted with energy, enthusiasm, and lots of compliments to the patient for being there and being committed to good oral health. The emotional experience is primary. Patients should feel they received value, and if they do, they will preappoint for the next visit.

Emergency exams: Whenever a patient calls with an emergency, it is celebration time. A guaranteed sale is about to take place. The team must get excited, review the schedule, and fit that emergency in with enthusiasm, commitment, and determination - nothing less will do!

### **Segue the examination process from enrollment to treatment**

It is not uncommon for a doctor to complete an exam, and then flee the room hoping the team will complete the enrollment process. Sometimes it works, but frequently it doesn't. A total breakdown occurs when the patient tells the administrative team, "I think I need some work done and I'm not sure what it is."

After the examination - during which the doctor has explained in simple English what he or she sees - a discussion should take place to explain the "musts" and "shoulds" to the patient. A "must" is treatment that needs to be done now, either to save the tooth or prevent future pain. A "should" is treatment that can be planned for the future.

After recommending treatment, the doctor should ask, "Mary, are you ready to schedule treatment?" When the patient says "yes," congratulate her on commitment to

better health. If she says, "I'm concerned about the cost," the doctor should reply, "I can appreciate your concern. My team will help you research a way to pay for this investment in your oral health. When we can make this investment affordable for you, are you ready to schedule treatment?" If the patient says no to treatment, the doctor should reply, "What would have to happen in order for you to schedule this treatment?" The doctor and team can then address these genuine concerns that prevent the patient from accepting the care that has been offered.

When the patient accepts treatment recommendations, the hand-off to the administrative team should go something like this: "Mrs. Jones has asked us to schedule this treatment for her." Transfer of ownership has now occurred, and the patient now owns the decision to follow through with treatment. It is essential that the patient "owns" the treatment. Too often, the practice owns the treatment!

### **Develop a powerhouse hygiene department**

The beauty of a well-managed hygiene department is that, metaphorically, it is like generating income six months out. All you have to do is create sufficient value so that the patient wants to return in three to six months. The added benefit is that, in many cases, insurance covers the cost.

Preappoint patients in the 90th percentile and have a system in place that guarantees three points of contact with them to ensure they return for their appointments. Separate your patient charts into those with appointments and those without. Chart-audit those that don't have appointments and get them on the schedule. Always run "hygiene hungry," so that you have more openings than patients. In this way, practice growth is guaranteed.

In a strong general practice, the goal is to have 40% of practice production from exams, X-rays, and hygiene procedures. Each doctor needs two full-time hygienists to approach this goal. Some doctors work with three hygienists and commonly exceed this goal. A smart business doctor realizes that full use of auxiliary personnel is the best way to take great care of patients and significantly increase production and profitability. Work to change your state practice acts to allow skilled team members to perform functions that you currently do that could be done by a trained, qualified team member. This allows your business to grow and improve quality of care. This "win-win" strategy increases profitability.

### **Fully engage your team to own the vision, team agreements, and your philosophy of patient care**

As a doctor, you need to know that, at all times, your patients are being cared for physically and emotionally at the level you desire. To achieve this goal, set aside time,

perhaps out of the office, to work with the team on the following:

Create a clear vision that is supported and understood by your team. Discuss what it truly means, what it would look like, sound like, and feel like when fully implemented.

Create team agreements. These agreements are a code of honor, fully supported by each team member, defining what you will be for each other, the team, the patients, and the business. Each team member signs and dates these agreements. Their integrity is now at stake to honor these agreements.

Define, as a team, a standard of care that addresses as many aspects of patient care as you can think of - i.e., what you will do and what you won't do.

The more team members are involved in creating the culture of your practice, the more ownership they will have. This also allows you to coach team performance based on the vision and agreements, which allows for easier leadership and management.

Examine these five steps to better practice management and get good coaching to make them happen. These steps are not new ? the bottom line is to do them consistently, and long-term success will be yours.

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